Quick Install Guide

The current version of this guide was published on 5/21/2015. Verify that you have the latest version of this guide and the Abila Millennium Installation Guide. The guides can be downloaded from http://kb.abila.com.

This guide is used by both new organizations and organizations that are upgrading, and used in conjunction with the Abila Millennium Installation Guide (Installation Guide) version 2015.1. For upgrading organizations, some of the steps in the guide may not be necessary to perform, but it is important to review all steps in order to insure that settings are correct.

Web Server Installation

IIS Server Preparation

– Verify that the IIS Server meets or exceeds the system requirements. The latest system requirements are available at abila.com/solutions/millennium.

– Verify that the Web Server (IIS) Role and the applicable (to your server) ASP.NET Application Development feature are installed. For Windows Server 2008, ASP.NET must be installed. For Windows Server 2012, ASP.NET 4.5 must be installed.

– Verify that the .json MIME type is configured for the IIS Server.

– Back up the IIS Server.

– Remove Crystal Reporting software (used by report writers) if it is currently installed on the IIS Server.

Upgrading organizations

– You must be running Abila Millennium version 2013 or 2014. If you are on version 7.4 or later, incrementally upgrade your Web Server and convert your database through all of the major versions that were released after your version.

– If you do not own a Sage product, then uninstall Sage Advisor Update from the IIS Server. Sage E-marketing and Sage Payment Solutions are two examples of Sage products that you may currently own. If you own at least one Sage product, then do not remove Sage Advisor Update.

– Back up custom Online Constituent Directory (OCD) templates if your organization uses the OCD (inetpub\wwwroot\mill\ecomm).
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– Back up custom report templates (\inetpub\wwwroot\mill\Java\CustomTemplate).

– Back up custom Site-Specific Help procedures (\inetpub\wwwroot\mill\Help).

Note:
If you upgrade from an Abila Millennium version 2013 or earlier, you might have cookies turned off for the site because of an issue that occurred in older versions of the product. This issue was resolved in version 2014.0, so there is no longer any need to turn cookies off for the product. The upgrade script for Millennium version 2015.1 will turn cookies back on for the site. If your organization prohibits cookies, contact Abila Customer Support, or visit the Abila Knowledgebase at http://kb.abila.com.

Database Server Preparation

SQL organizations
– The milldata and millreports database collations must match. We recommend Latin 1 General BIN, but if the master and tempdb databases have a different collation, you may need to use a different collation for milldata and millreports. The milldata, millreports, master, and tempdb databases should have the same collation. Regardless of character set, use a BIN (binary) sort.

– The compatibility level on the milldata and millreports databases must be set to 90 (SQL 2005) or higher.

– Disable Auto Shrink on the data database.

Oracle organizations
– The recommended NLS_CHARACTERSET is WE8MSWIN1252 to support the special characters that are used by the application.

Database Conversion Preparation

– New installs: identify or create the database for the application to use.

– Create the Web SQL ODBC connections at the IIS Server. If you are running Abila Millennium on a 64-bit operating system, then you will need to create a 32-bit and a 64-bit ODBC connection. Upgrading organizations may only need to verify that the correct Web SQL ODBC connections are present.

– Back up the data database (milldata). SQL Server organizations, back up your millreports database.

– The database conversion adds a new lookup table entry to the report_groups lookup table - code/value: driv/Drive. If drivX (where X is any value, or blank) code(s) already exist in the report_groups lookup table, we suggest that you manually change your codes before you upgrade. The database conversion program
will also add new entries to the memory_names table - code/value: abila1/Total Giving, abila2/Consecutive Years Giving, abila3/Largest Gift. abila4/Total Giving Year to Date.

Installing/Upgrading the Web Server

1. Log on to the IIS Server as a site administrator with administrative privileges on the computer and with full access to all directories in inetpub\wwwroot\mill.

2. At the IIS Server, double-click on the self-extracting zip file to extract the installation files. Enter the path and name of the directory into which to extract the installation files, or accept the default. The directory path and name can not contain spaces.

3. If the installation program does not start, browse to the directory into which the installation files were extracted and click AutoRun.exe.

4. Click Install Millennium Web Server.

5. The installation program checks for components that are needed on the computer before the Web Server components can be installed. If one or more of the required items are missing, the install requirements page displays. Click Install.

6. On the Welcome page, click Next.

7. For new installs: type the Serial Number and Registration Number that was provided to your organization and click Next.

8. On the Destination Folder page, indicate the location where Abila Millennium will be installed. You can accept the default location or click Change to specify a different one. Click Next.

9. Click the database engine option that applies to your organization and select the Start upgrade of your 2013/2014 database to 2015.1 at the end of installation check box to automatically launch the conversion of the database to 2015.1 after the Web Server installation completes. If you do not select this check box, then you must manually convert your database after the installation (refer to Chapter 2 in the Abila Millennium Installation Guide for instructions).

10. Click Next. Click Next on the Ready to Install screen. When the installation is complete, click Finish.

11. The database conversion program launches automatically if you selected the Start upgrade of your 2013/2014 database to 2015.1 at the end of installation option. Database conversion errors (if any) are written to a log file. Review inetpub\wwwroot\mill\Tools\log\conv2015_1.log and correct errors as necessary. Then, run conv2015_1.exe (the database conversion program) from the inetpub\wwwroot\mill\Tools directory.
For 2015.1, sixty-five new columns are added to the memories table. Depending on the number of data records in your memories table, the database conversion program may take longer than usual.

**Anonymous Access User**

- The IIS Server and all Reporting Server computers must have a common user account to use as the Anonymous Access user. You can use a domain account, or you can use a local user account that can be recreated on the Reporting Server computers. An account that is recreated on Reporting Server computers must have the same user name and password as the account on the IIS Server. If your system is distributed over different computers, then you cannot use the IIS IUSR built-in account. You must use a custom domain or user account as the Anonymous Access User.

- Create an Anonymous Access User account or identify an existing domain or local user account that is usable for your system.

- Oracle organizations: grant the Anonymous Access User **Read & Execute, List Folder Contents, and Read** on the Security tab of the directory in which the Oracle client tools are installed.

**IIS Server Configuration**

- Set the Feature Delegation for **Handler Mappings** and for **Modules** to Read/Write at the server level or at the Default Web Site level.

- Configure the Application Pool settings for **MillAppPool** (**IIS Manager (run as administrator) > Application Pools > MillAppPool > Advanced Settings**).

  - Set the **Identity** to the Anonymous Access User.

  - Set **Start Automatically** to True.

  - If you are running on a 64-bit operating system, then set **Enable 32-Bit Applications** to True.

- At the Default Web Site level, verify **Anonymous Authentication is Enabled**, and set the **Anonymous Authentication Credentials** to the Anonymous Access User (MillAppPool Identity) (**IIS Manager (run as administrator) > Default Web Site > Authentication > Anonymous Authentication > Edit > Specific user > Set**). Enter the Anonymous Access User (MillAppPool Identity) user name and password.

- Restart the IIS.


- Use **Table 1: IIS Server Security and Share Permissions** to share directories and to grant directory share and security permissions. Be aware that all Queue User accounts may not yet exist on the IIS Server.
After installing a Reporting Server, you may need to return to the IIS Server to set these directory share and security permissions for the Queue User.

<table>
<thead>
<tr>
<th>Directory</th>
<th>Share?</th>
<th>Security Permissions</th>
<th>Share Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>\inetpub\wwwroot\mill\Formats (SQL) or \inetpub\wwwroot\mill\OracleFormats (Oracle)</td>
<td>Yes</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control All Users who will be creating and editing report formats - Full Control</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control All Users who will be creating and editing report formats - Full Control</td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\reports</td>
<td>Yes</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control</td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\Docs (or the virtual directory containing the Docs folder, if you are not using the default location)</td>
<td>Yes</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control All Users who will be attaching documents to data rows (attachments) - Write</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control</td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\Exports</td>
<td>Yes</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control Queue User - Full Control</td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\reports\import</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control</td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\tools\log</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) -</td>
<td>Anonymous Access User (MillAppPool Identity) -</td>
</tr>
</tbody>
</table>

Table 1: IIS Server Security and Share Permissions
<table>
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<th>Security Permissions</th>
<th>Share Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>\inetpub\wwwroot\mill\tools\WebReports</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control</td>
<td></td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\de</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control</td>
<td></td>
</tr>
<tr>
<td>\inetpub\wwwroot\mill\bits</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control</td>
<td></td>
</tr>
<tr>
<td>\windows\temp</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) - Full Control</td>
<td></td>
</tr>
<tr>
<td>\inetpub\mailroot</td>
<td>No</td>
<td>Anonymous Access User (MillAppPool Identity) - Write</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(only if using SMTP with Abila Millennium)</td>
<td></td>
</tr>
</tbody>
</table>

Table 1: IIS Server Security and Share Permissions (continued)

- At the root for the JSI FundRaising Systems, Inc. registry key, grant Full Control permissions to the Anonymous Access User (MillAppPool Identity).

- Verify that the SMTP service is set up and working if your organization will be using Assignments e-mail notifications and/or sending Online Constituent Directory log on credentials to constituents who forget them. SMTP is installed and configured by your organization's IT Department, but you will need to inform them that it must be installed to X:\Inetpub\mailroot. Review the Installation Guide, Appendix B - Abila Millennium and SMTP.

- Verify that the SQL Server or Oracle database services are started on the Database Server computer.

- Verify that the World Wide Web Publishing, Millennium Assignment Service (if used), and SMTP (if used) services are started on the IIS Server.

- Implementing SSL is recommended.

**Reporting Server Installation**

The Reporting Server installation program is run on every computer that will function as a Reporting Server.
Preparation

– Verify that the Reporting Server computer meets or exceeds the system requirements. The latest system requirements are available at http://abila.com/solutions/millennium.

– Back up the Reporting Server computer.

– If a Reporting Server is already installed, then stop the Millennium Queue Service (if you are running the queue as a service) or close queue.exe (if open).

– If a Reporting Server is already installed, then it must be version 2013 or 2014. If it is a version that is earlier than 2013, then it must be uninstalled.

Installing/Upgrading a Reporting Server

1. Log on to the Reporting Server computer as the site administrator with administrative privileges on the computer. Double-click on the self-extracting zip file to start extraction. If the installation program does not start, browse to the directory into which the installation files were extracted and click AutoRun.exe.

2. Click Install Millennium Reporting Server.

3. The installation program checks for components that are needed on the computer before the Reporting Server can be installed. If one or more of the required items are missing, the install requirements page displays. Click Install.

4. On the welcome page, click Next to proceed. The installation program fills in the location of the installed files. Accept the default destination or Browse to select a different destination, and click Next.

   Make sure you click No for the option to Remove Crystal Reports. Selecting No prevents the upgrade from removing existing Crystal reports from the system.

5. Click Next on the Ready to Install screen. When the installation is complete, click Finish.

Queue User

If the Queue will be run as an application, the Queue User already exists. It is the user who logs on to the Reporting Server computer. If the Queue will be run as a service, an existing user account can be used as the Queue User when you install the Queue as a service (but it does not have to be). If using an existing user account as the Queue User, verify that the user group to which the Queue User belongs has Read and Write permissions to the JSI FundRaising Systems, Inc. registry key on the Reporting Server computer. If not, move the Queue User to a group that has the correct permissions.
**Reporting Server Configuration**

All configuration tasks, unless otherwise noted, are performed at the Reporting Server computer.

- Create a user account that is identical to the Anonymous Access User (MillAppPool Identity) that was configured for use on the IIS Server (or verify that an identical Anonymous Access User already exists on the Reporting Server computer).


- If the Queue will be run as a service: go to the QUEUE directory and launch QueueAdmin.exe (run as administrator). Refer to the instructions in the *Installation Guide, Appendix C- Installing and Running the Queue as a Service*.

- Create the 32-bit ODBC Web SQL connection.

- Use Table 2: *Reporting Server Security and Share Permissions* to share directories and to grant directory security and share permissions. Remember that the Anonymous Access User on the Reporting Server is identical to the Anonymous Access User (MillAppPool Identity) on the Web (IIS) Server.

<table>
<thead>
<tr>
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<th>Share?</th>
<th>Security Permissions</th>
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</tr>
</thead>
<tbody>
<tr>
<td>\QUEUE</td>
<td>Yes</td>
<td>Anonymous Access User - Full Control</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Queue User - Full Control</td>
<td>Anonymous Access User - Full Control</td>
</tr>
<tr>
<td>\windows\temp</td>
<td>No</td>
<td>Queue User - Write</td>
<td>Queue User - Full Control</td>
</tr>
</tbody>
</table>

Table 2: Reporting Server Security and Share Permissions

- At the *IIS Server computer*, create a user account for the Queue User (if one does not already exist). The account must be identical to the Queue User account that was configured for use on the Reporting Server.

- At the *IIS Server computer*, use Table 1: *IIS Server Security and Share Permissions* (in the *IIS Server Configuration* section of this guide), to grant directory share and security permissions to the Queue User.

- Verify that the SQL Server or Oracle database services are started on the Database Server computer.

- Verify that the *World Wide Web Publishing Services* are started on the IIS Server.

- If the Queue is run as an application: verify that queue.exe is running on the Reporting Server computer.

- If the Queue is run as a service: verify that *Millennium Queue Service* is started on the Reporting Server computer.
Abila Millennium Reporting System Information

Log on to Abila Millennium as a Millennium or database administrator and access the System Information page (Tools > System Upkeep > System Information) to enter the following information.

– **Institution**: enter your organization name (as you want it to appear on reports).

– **HTML Report Location**: the UNC path to the IIS Server reports directory. Enter as `\<IIS Server name>\reports`.

– **Report Template Format Location**: the UNC path to the IIS Server formats (or OracleFormats) directory. Enter as `\<IIS Server name>\Formats` for SQL Server or `\<IIS Server name>\OracleFormats` for Oracle.

– **Default Format Location**: the UNC path to one of the IIS Server formats sub-directories. Enter as `\<IIS Server name>\Formats\Bio` for SQL Server, or `\<IIS Server name>\OracleFormats\Bio` for Oracle.

– **Default Export Path**: the UNC path to the IIS Server exports directory. Enter as `\<IIS Server name>\Exports`.

– **Photos Location**: the full UNC path for the Docs Virtual Directory (the location of Abila Millennium Attachments). If using the default Docs directory, enter as `\<IIS Server name>\Docs`.

– **Reporting Queues** (enter this information for each Reporting Server that you have installed and configured):

  For SQL Server:

  – **Queue**: the name of the queue.

  – **Queue Location**: the UNC Path to `queue.exe`. Enter as `\<Reporting Server computer name>\Queue`.

  – **Database Computer**: the name of the server (as identified in your network) where the data database or a replicated copy of the database is located. If you have multiple database instances on the same server, you will enter it as `<server name>\<instance name>`.

  – **Data Database**: the database name (case sensitive); for example, `milldata`.

  – **Primary Database Computer**: the name of the server (as identified in your network) that hosts the production database. If you have multiple database instances on the same server, you will enter it as `<server name>\<instance name>`.

  For Oracle:

  – **Queue**: the name of the queue.
Queue Location: the UNC Path to queue.exe. Enter as \<Reporting Server computer name>\Queue.

Database Alias: enter the Net easy connect string for the reporting database. If your reporting database is not replicated, this information will be the same as the alias for the primary database.

ODBC DSN: enter Web SQL.

Primary Database Alias: enter the Oracle Net Service name for the production database.

Replicated Databases (not applicable if you do not use replicated databases):

For SQL Server:

Replicated Database Computer: Name of replicated server.

Database: Name of database on the replicated server.

For Oracle:

Replicated Database Alias: the Net easy connect string for replicating database.

Reporting Printers

At the Reporting Server computer, go to the QUEUE directory and launch printers.exe to define one or more printers for the Reporting Server Queue. Refer to the instructions in the Installation Guide, Appendix D - Defining Printers.

Test Reports

Abila makes every attempt to ensure that your custom reports will run after upgrading to the latest version of Abila Millennium. However, due to the highly customizable nature of reports, we cannot guarantee that all custom reports will run after an upgrade without modification.

Run an unmodified standard report that includes prompts and Crystal parameters to completion through every Reporting Server Queue that you have installed and configured (Single Line with Gift Totals, for example).

Print the unmodified standard report to each reporting printer that you have defined.

Run an On-Demand report, such as Full Profile, for a constituent.
Workstation and Mobile Configuration

Refer to the instructions in the Installation Guide, Chapter 4 - Configuring Workstations and Mobile for Use with Abila Millennium to complete (or review) the following:

– Install and configure the recommended version of Java on workstations.

– Configure workstations to improve how Abila Millennium will work with supported browsers.

– Download and install, (if necessary) third-party tools to enable you to take advantage of Abila Millennium features such as On Demand Reports and Write a Letter.

– Point mobile devices (for users who will access Abila Millennium by using a mobile device) to the proper location on the Web Server (IIS) computer.

Display and System Settings

Refer to the instructions in the Installation Guide, Chapter 5 - Display and System Settings to review additional installation considerations and system settings:

– Data display, entry and maintenance forms customizations

– Display options

– System options